How to Build A Competency Model → In Record Time

atd

Presented By:
Cheryl Lasse, SkillDirector

SkillDirector™
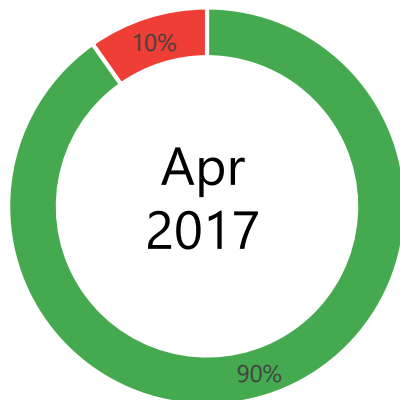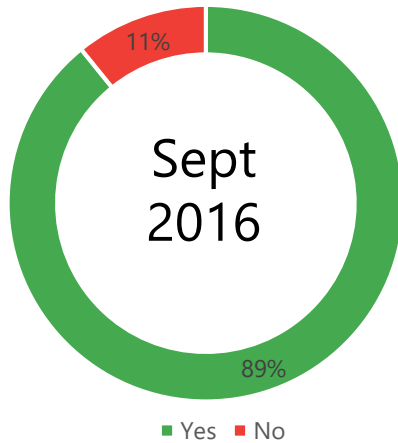PERSONALIZED LEARNING

Webcast Objectives

In this webinar you will learn:

- ✹ Steps to create the competency model, along with to help you do it

- ✹ How this process can help you protect the knowledge and best practices of those set to retire

- ✹ How to make your competency models actionable and strategic

Skills = currency...
want more?

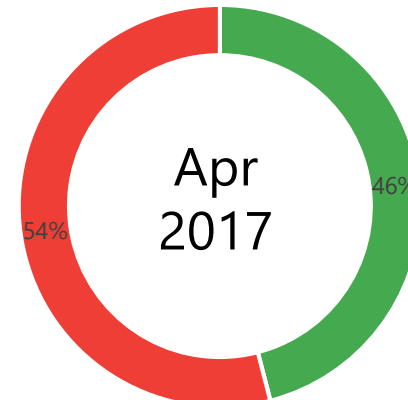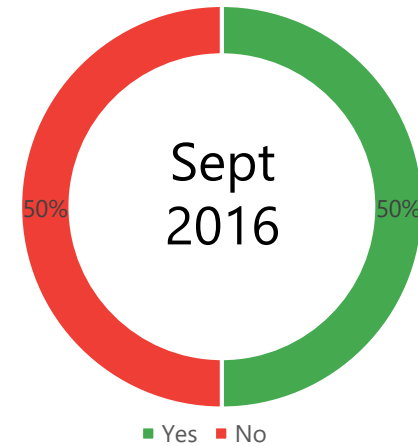**SkillDirector™**
PERSONALIZED LEARNING
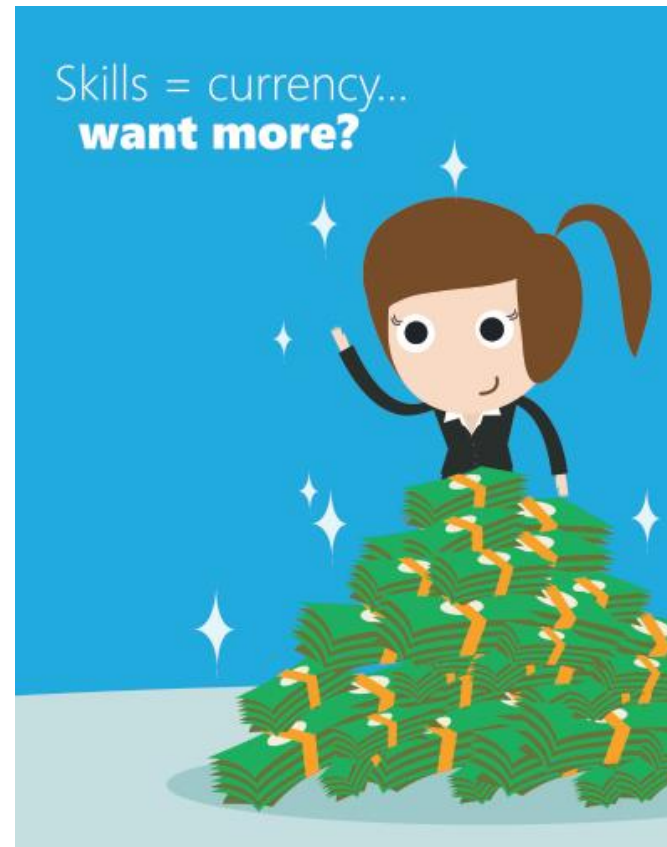
What do your organizations expect?

Does your organization expect employees to own their development and career planning?

Do you use competency models to drive professional development?

Sept 2016

- 11% No
- 89% Yes
- Yes | No

Sept 2016

- 50% No
- 50% Yes
- Yes | No

Apr 2017

- 10% No
- 90% Yes

Apr 2017

- 54% No
- 46% Yes

September 21, 2016 pre-webinar survey questions compared with April 25, 2017 pre-webinar survey questions
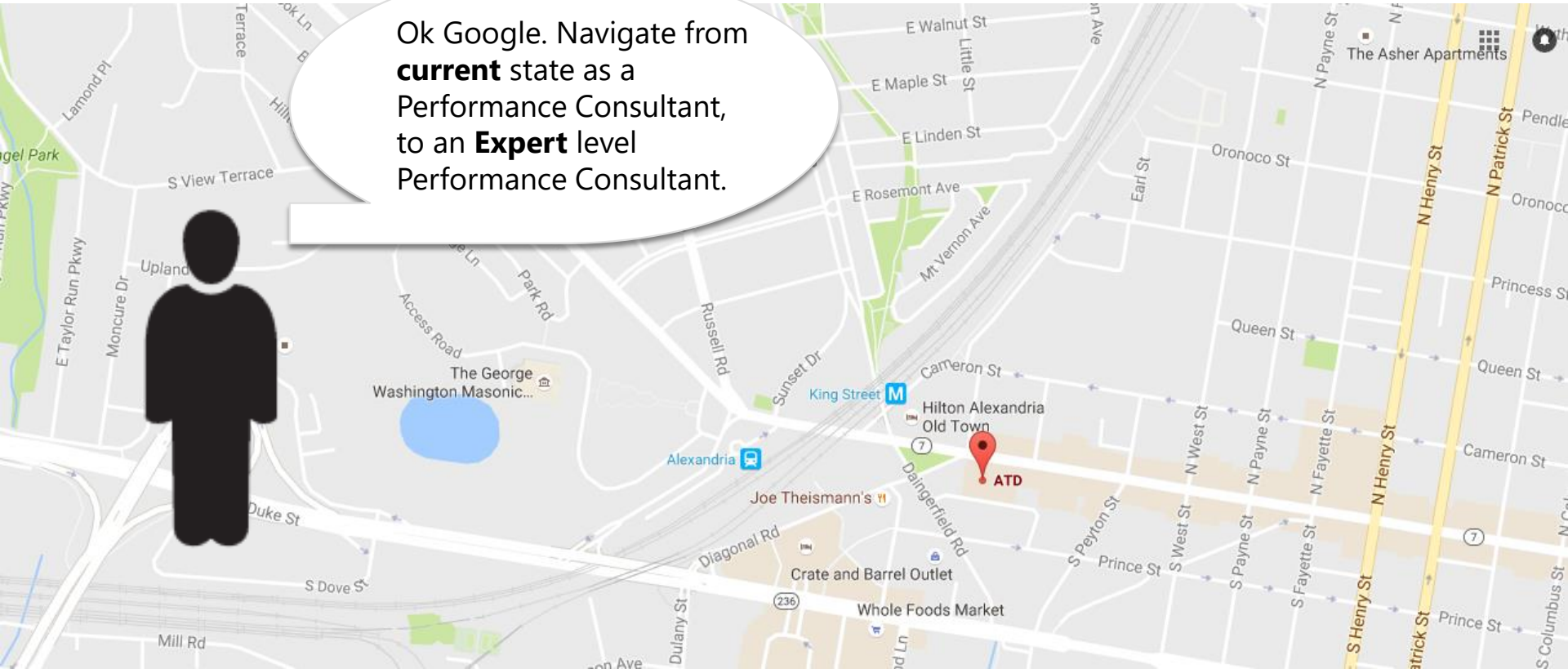For more on Employees Taking Charge, watch webinar or download white paper.

A competency model describes what it looks like to be great in your role
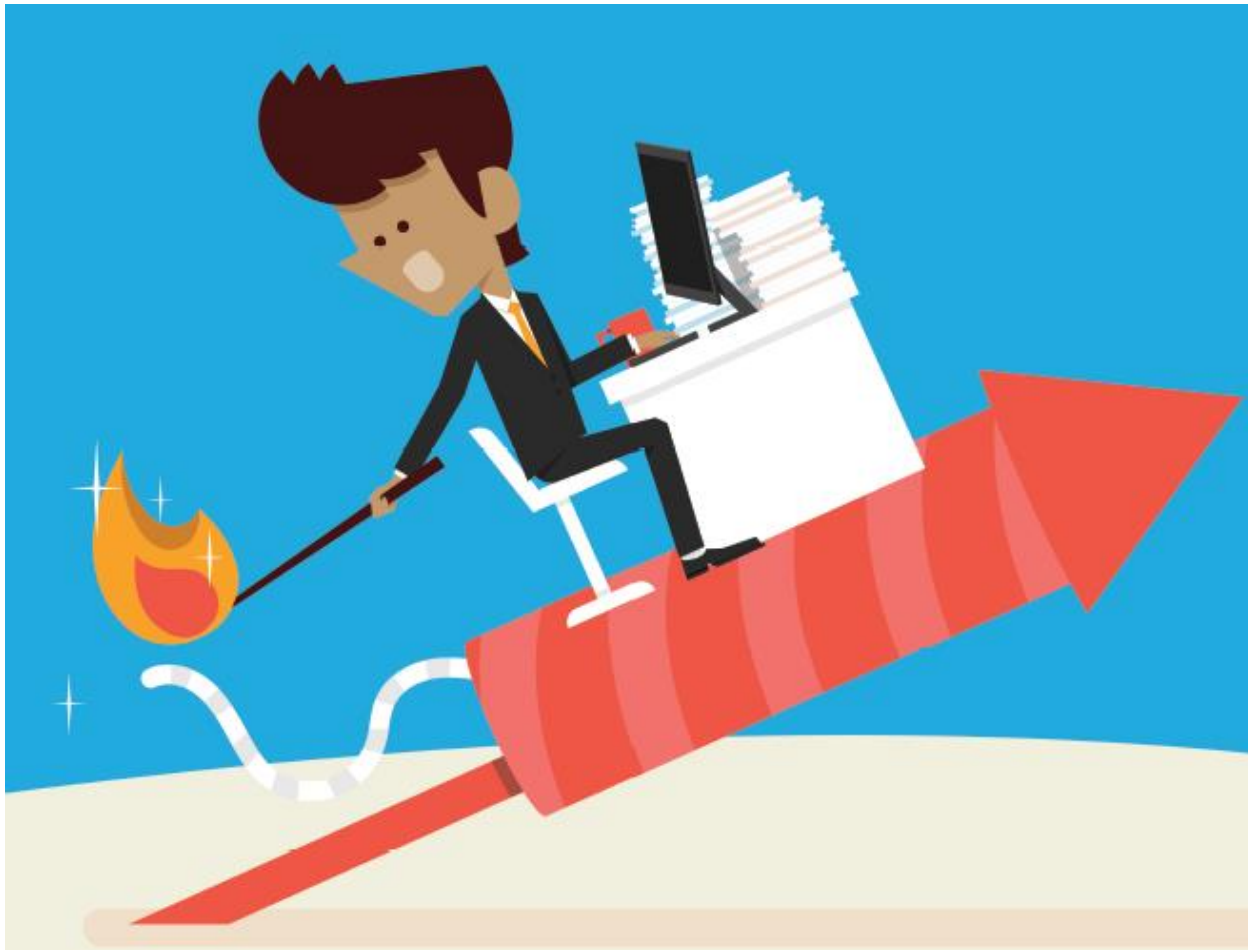
Competency Models

Ok Google. Navigate from **current** state as a Performance Consultant, to an **Expert** level Performance Consultant.

Competency Models

Competency Model Development

1 Conduct a Rapid JTA Workshop

2 Identify Task Examples

3 Perform a Task Proficiency Analysis

Conduct a Rapid JTA Workshop

One day

Facilitator & Recorder

4-6 High Performers & 1 Manager

See it live: ATD Conference May 23, 2017 @3pm
TU304 in the Sidney Marcus Theater
Add it to your schedule

Rapid JTA Workshop Preparation

Rapid JTA Workshop Preparation

[COMPANY's] biggest asset is our people. It is our commitment to ensure our people are highly skilled and have immediate access to the learning tools and resources they need to perform their jobs.

We are partnering with SkillDirector to perform a rapid job task analysis, a process by which we identify those tasks that high performing individuals in their role do to make them high performers. That is, we are trying to model the behavior of high performers so that we can make tools and resources available to others in that role, to help them develop and grow.

To that end, I would like to cordially invite you to participate in a workshop session to gather this data. **We feel that you can offer valuable and significant contributions to this process.** This session will be led by a professional facilitator, who will lead you and your peers through a discovery process, resulting in documentation of the core areas and tasks that are critical for success in your role. SkillDirector will be documenting the tasks, and then associate those tasks to existing and proposed learning materials. Shortly after the Rapid JTA Workshop, you will be provided with a list of behavioral examples that describe each task we defined. You will need to review them and document any additional things and other best practices that make you successful. Then, in the Task Example Workshop, we will review and refine those examples into a final list. As a result of this process, you and your peers will be able to assess yourselves against these job tasks, and self-direct to the development activities which can increase your proficiency and further your goals.

Time commitment:
- 4 hours for the Rapid JTA Workshop, and 15 minutes to confirm the results the following day
- 1-2 hours to review the draft behavioral examples provided (this is critical to success) prior to the Task Example Workshop
- 3-4 hours for the Task Example Workshop to review and discuss collective feedback

Please let me know, as soon as possible, if you are able to attend this Rapid JTA Workshop in [LOCATION] on [DATE], and the Task Example Workshop in [LOCATION] on [DATE].

We look forward to your valuable input in achieving common goals... enabling each member of the team to own their development, and to identify training development and delivery priorities so we can make development opportunities available to those who want and need them.
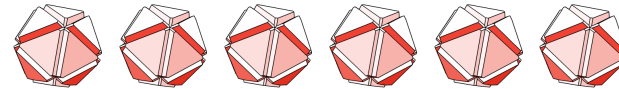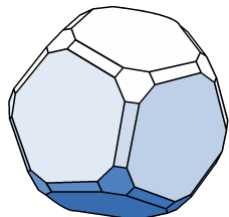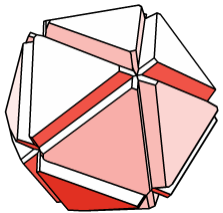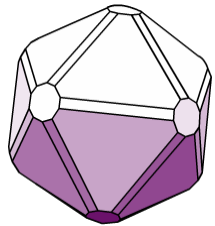
10

Rapid JTA Workshop Execution

Agenda

Timing
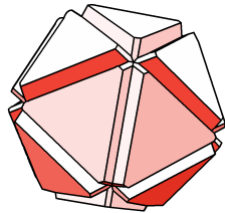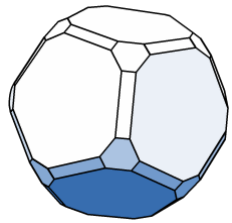
Templates
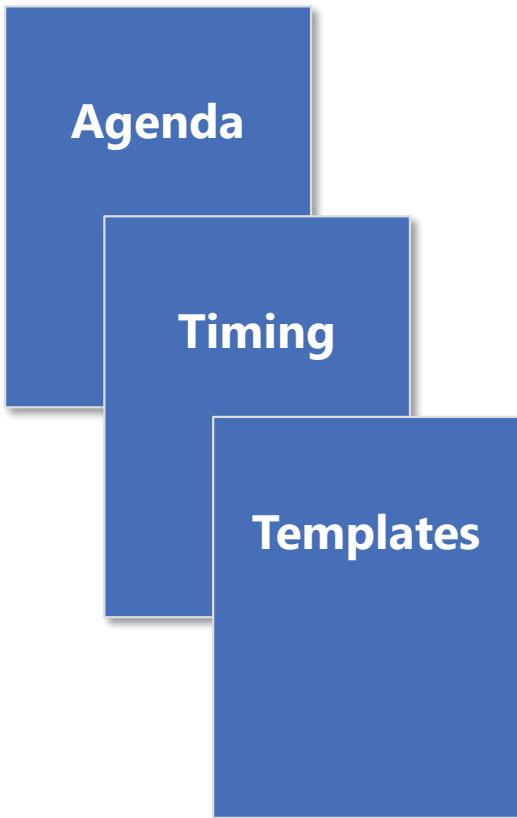
Nominal Group Technique

Rapid JTA Workshop Execution

1) Categories   **2) Tasks**

Rapid JTA Workshop Execution

- Management
- Customer Relationship Management
- Sales Support
- Project Execution
- Improvements
- Collaborating Internally
- Personal development

Sales Support	Project management	Proposal support
Mentoring	Innovating	Tracking project financials and metrics
Work with engineering	Field Support	Quality/process improvements
Growth strategy	Identify and plan for team training (needs analysis)	Execute projects (doing or managing the work)
Issue resolution/case support	Resource planning/scheduling – project specific Resource planning/scheduling/ Resource utilization	Participate in new product rollouts
Collaborating	Defining operational strategy	Product support strategies and implementation
Customer visits	Development activities	

13

Rapid JTA Workshop Execution

Job to be Analyzed	
Date	
Location	

Participant Section

Role	Job Title	Name	Location
Participant			
Participant			
Participant			
Participant			
Participant			
Participant			
Observer			
Observer			
Observer			

List of Functional Areas

Project Execution
Management
Customer Relationship Management
Internal Collaboration
Sales Support
Improvement
Personal Development

14

Rapid JTA Workshop Execution

Functional Area 1: Project Execution			
Task Number	**Task Statement**	**Behavioral Example Notes**	**Critical To Success?**
	Project management Tracking project financials and metrics Field support Issue resolution/case support Execute projects (doing or managing the work) Resource planning/scheduling – project specific		

Rapid JTA Workshop Execution

Critical To Success Themes
Learning Opportunities & Assets Available
How did you learn these skills (formal and informal)? What tools or templates or checklists have you created? Would you share them?
Learning Opportunity Gaps

Rapid JTA Workshop Execution

Rapid JTA Workshop Follow Up Activities

Tasks (Original)	Polished Tasks	Task Examples
Complete performance reviews	Drive the development of people on my team	• Complete performance reviews
Conduct informal and formal reviews of employees throughout the year		• Conduct informal and formal reviews of employees throughout the year
Talk to people about their next job role		• Talk to people about their next job role
(L4) Use blended assessment results to add structure to conversations		• (L4) Use blended assessment results to add structure to conversations
(L5) Make personal development a part of every conversation		• (L5) Make personal development a part of every conversation

SkillDirector™
PERSONALIZED LEARNING

18

Rapid JTA Workshop FAQs

* If you can't come up with any examples of what a task looks like at various proficiency levels, then it's an example of something else

* Don't focus on knowledge alone – focus on what they need to be able to **DO** with that knowledge

* There is no magic number of skills, though 15-30 is typical (consider the role)

* A competency model doesn't define everything you do in a role, but rather **what's important** to execute corporate strategy

* Big models should be broken into something more digestible and actionable

Rapid JTA Workshop Follow Up Activities

From ▾	classe@skilldirector.com	
To...	jsmith@skilldirector.com	
Cc...		
Bcc...		
Subject	IMPORTANT: Feedback requested by November 18, 2015	

Thank you for your participation and insight!

Attached is the final task list from our session. We spent a great deal of time refining them to follow the proper task convention. Some items were behavioral examples of other tasks, so they are still in the document, but moved into the Task Example column. < FILE NAME>

Our request, by 5pm Eastern on November 18:
- Review the tasks and task examples and make sure they well represent what we came up with in the session. Track changes is on, so make whatever adjustments you feel are required. We'll be using this document as the input for our next step.
- Either send back this document with your edits, or if you have no edits, send the reply "Confirmed".

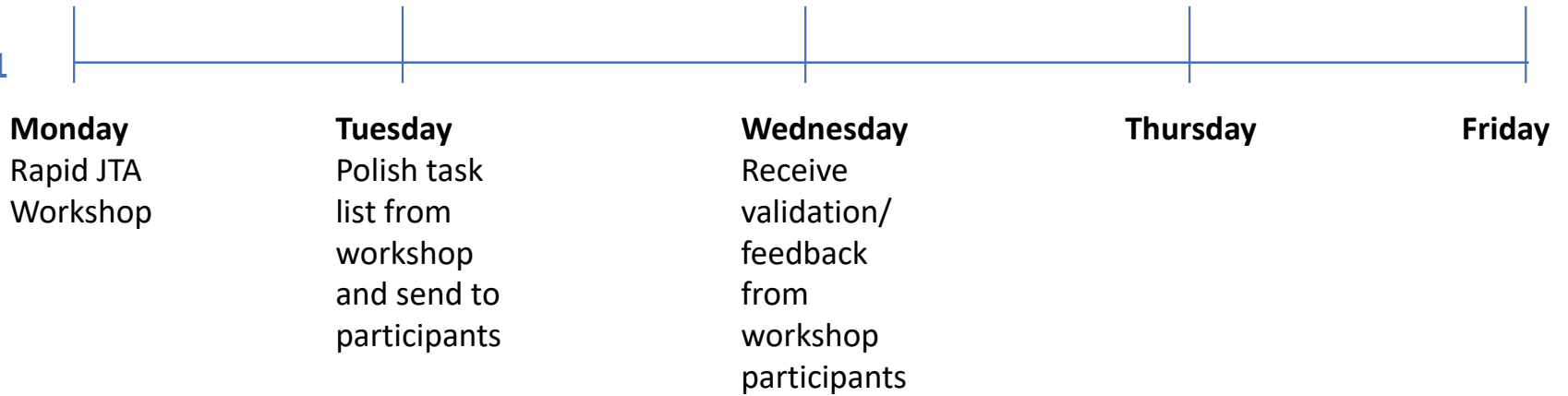We need to start drafting the task examples on Thursday morning. Thank you!

Best regards,
Cheryl

Cheryl Lasse, Managing Partner
SkillDirector / www.skilldirector.com
classe@skilldirector.com / Tel: 407.876.9850

Rapid JTA Workshop Timeframe

Wk 1

Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**
Rapid JTA Workshop	Polish task list from workshop and send to participants	Receive validation/ feedback from workshop participants		

SkillDirector™
PERSONALIZED LEARNING

Identify Task Examples

Category	Task/Skill	Limited Awareness	General Awareness	Applied Knowledge	Skilled	Expert
Aligning To Customers	Build trust through a customer-focused approach and advocacy	○	○	●	○	○
Building A Business Case	Identify clearly the business and financial benefits of a solution in a way that speaks to business impact					
Communicating Effectively	Demonstrate well prepared verbal and written communication and presentation techniques					
Communicating Effectively	Demonstrate timely responses to all inquiries for information within the requested amount of time					
Creating And Closing Opportunities	Research and target prospects					
Creating And Closing Opportunities	Conduct interest-building calls (cold calls) when appropriate					
Creating And Closing Opportunities	Identify sales leads					
Creating And Closing Opportunities	Follow up/manages sales leads					

Demonstrate well prepared verbal and written communication and presentation techniques

Rating	Behavioral Examples

5 - Expert	• Build templates and tools for enabling customer-focused communication, capturing the motivation, needs and requirements of stakeholders
	  o Stakeholder profiles
	  o Lists of discovery questions
	• Anticipate objections and proactively overcome them with data before the objection arises
	• Craft a persuasive argument on-the-fly to neutralize dissenters
	• Display Skilled behaviors

4 - Skilled	• Use a structured technique for enabling customer-focused communication
	  o Use discovery question lists
	  o Document profiles of each stakeholder, and update them as new insight is obtained
	• Perform thorough research before creating any written communication, or building any presentation
	• Anticipate objections
	• Often able to sway others to a strategy that may have higher short term costs but more long term benefits
	• Coach others on how to prepare and deliver customer-focused communication
	• Display Applied Knowledge behaviors

3 - Applied Knowledge	• Use a customer-focused approach to communication
	• Research the role and background of stakeholders
	  o Ask probing, open-ended questions about their needs
	  o Ask "why?"
	  o Talk to peers about stakeholder motivations, needs and requirements
	• Ensure every communication has a purpose and delivers value to the recipient(s)
	• Plan communications to weave supporting data throughout to support recommendations and timing considerations
	• Can prepare a concise, motivating and persuasive presentation
	• Use clear and concise communication (e.g., bullet points, summaries, etc.)

2 - General Awareness	• Use the proper grammar and spelling in communications • Proof my work before sending anything in writing • Can prepare a complete, logical presentation • Gather appropriate supporting data before discussing with others • Have supporting available should the need arise – it's presented as support
1 - Limited Awareness	• Focus on the speed of communication, more than the quality • Am great at "winging it" – can deliver a presentation, state my position, or write others without much preparation

SkillDirector™ PERSONALIZED LEARNING

22

Scale Descriptors

Value	Label	Description
5	Expert	Innovate. Develop and apply task/skills/knowledge in new and unique ways. Create and share expertise and best practices. Create structure. Demonstrate foresight.
4	Skilled	Demonstrate advanced task/skill/knowledge. Apply structure. Demonstrate insight. Coach others.
3	Applied	Perform task/skill consistently, accurately and independently.
2	Basic	Understand basics of task/skill/knowledge. May perform task/skill at a basic level, or perform with coaching and supervision.
1	Learning	Have limited awareness of task/skill/knowledge. Require development/coaching.

SkillDirector™
PERSONALIZED LEARNING

Task Example

Coach and mentor my team

Rating	Behavioral Examples

5 - Expert	• Seek opportunities to coach and mentor outside of regularly scheduled sessions
	• Create tools and templates that educate and encourage others to become coaches and mentors
	  o Coaching/mentoring tip sheets
	  o Links to coaching/mentoring articles/blogs
	  o Recognition idea lists
	• Spend time at least once a week identifying task-based mentors for others, and coaching them to be better mentors
	• Assess the improvements of those being mentored
	• Display Skilled behaviors

4 - Skilled	• Proactively seek out opportunities to coach and mentor
	  o Develop a regular cadence for mentoring and coaching
	  o Connect people to other coaches and mentors in other fields of expertise
	• Spend at least some time out of every day coaching your team
	• Engage your entire team
	• Understand that others will elevate their skills by being task-based mentors for those tasks/skills where they are high performers
	• Display Applied Knowledge behaviors

3 - Applied Knowledge	• Coach your team, focusing on underperformers • Find what they can do well and maximize their talent • Utilize high performers to be task-based mentors for others
2 - General Awareness	• Coach and mentor upon request • Coach those who appear to be struggling at a particular task • Rarely utilize task-based mentors
1 - Limited Awareness	• Coach and mentor others through specific situations/activities • Coach those who ask for help • Never utilize task-based mentors

24

Task Example Bonuses

* Need to drive specific actions? Use frequency and consistency behaviors.

* Want to drive innovation? Make those your level 5 behaviors.

* Want a learning culture? Make learning behaviors increasingly prevalent as you move up the scale.

* Inspire people to level 5! When used during onboarding, you can quickly communicate what's important.
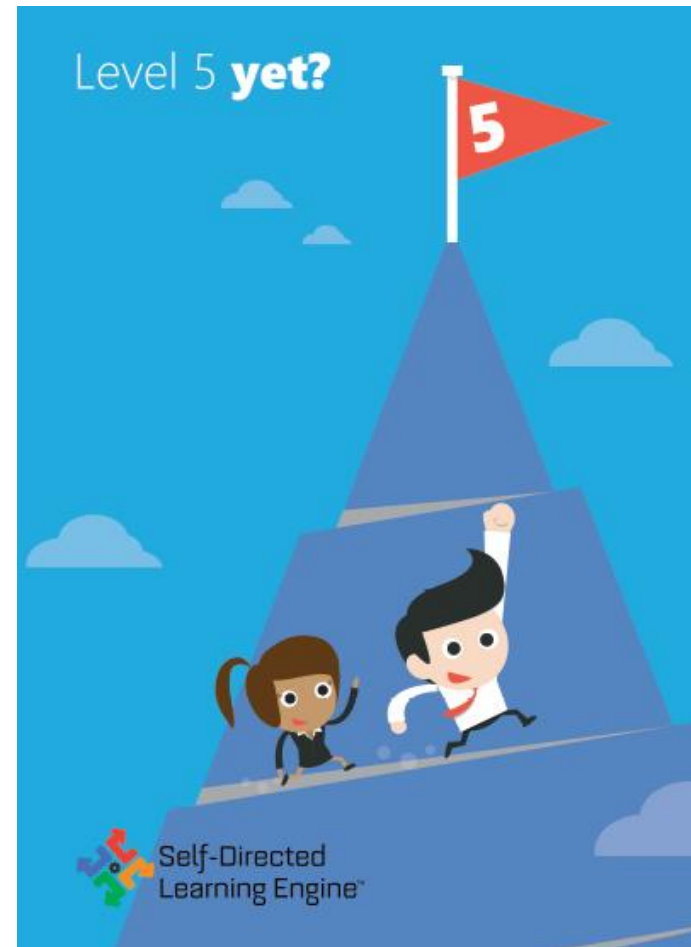
Pre-work must be required

Each participant will have to read through the examples and make additions, changes, and deletions, which typically takes them 1-2 hours.

Set expectations early by asking them to block the time on their calendar.

Task Example Timeframe

Wk 1

Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**
Rapid JTA Workshop	Polish task list from workshop and send	Receive validation/ feedback	Write task examples – level 3	Write task examples – remaining levels

Wk 2

Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**
Task example QA/review and send to participants	Participants review and edit task examples	Participants review and edit task examples	Participants review and edit task examples	Participants provide task example feedback & you consolidate edits

Task Examples - Edited

Set priorities and goals for the team/region

Critical to success

Rating	Behavioral Examples
5 - Expert	• Model the actions/behaviors I expect from my ~~team.~~ Utilize the skills and performance models of best bet employees to motivate and mentor coworkers who may be struggling
4 - Skilled	○ ~~Monthly~~ Weekly
3 - Applied Knowledge	

28

Task Proficiency Analysis

Competency Matrix (Framework by role)

Step 1: label the Roles

Step 2: using the model, put an X in the intersecting cells where that role performs that task

Step 3: change each X to a number 2, 3, or 4, representing the proficiency that role must have for this task

Category	Task	Critical To Success	Task Example Link	Role 1	Role 2	Role 3	Role 4

Sales Example
Task = Develop winning proposals with sound financial justification

- Account Executive = level 3
- Pre-Sales = level 2
- Sales Manager = level 4.
- Sales VP = level 5.

Summary

Wk 1

Monday	Tuesday	Wednesday	Thursday	Friday
Rapid JTA Workshop	Polish task list from workshop and send	Receive validation/ feedback	Write task examples – level 3	Write task examples – remaining levels

Wk 2

Monday	Tuesday	Wednesday	Thursday	Friday
Task example QA/review and send to participants	Participants review and edit task examples	Participants review and edit task examples	Participants review and edit task examples	Participants provide task example feedback / consolidate

Wk 3

| Monday	Tuesday	Wednesday	Thursday	Friday
Identify task examples: conduct workshop	Identify task examples: polish output	Perform task proficiency analysis	Summarize/ present	

30

Summary

In just 3 weeks (record time!), we know:

* ✦ What someone in a particular role should be able to do
* ✦ What each task looks like at various levels of proficiency → to GREAT
* ✦ What tasks are really critical to success
* ✦ The minimum levels of proficiency for people in this role or similar roles
* ✦ What learning opportunities helped high performers learn and continue to execute these tasks

SkillDirector™
PERSONALIZED LEARNING

Make your competency model actionable
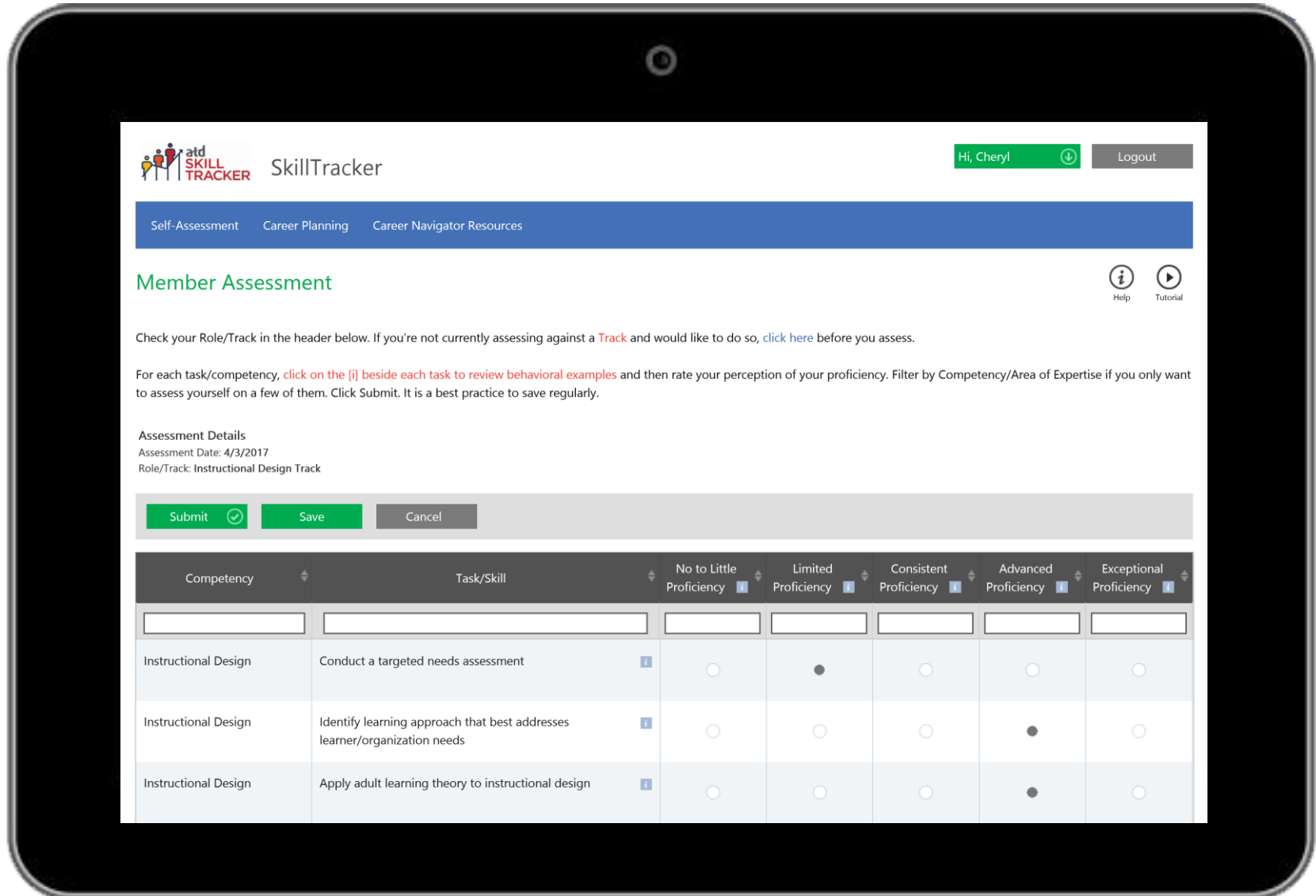
Competency Assessment Tool

For competency models to be valuable:

* ✿ Easily accessible

* ✿ Easy to measure yourself against them, to guide professional, competency-based development

* ✿ Like ATD Skill Tracker

Assessment Results: Personalized Learning Plan

Here you can see the automatically generated recommendations that can close your skill gaps. Printing or exporting the list will display additional information. Place a check in the On Development Plan column to add items to your short term development plan. If you make any changes, click the Submit button.

Priority	Task/Skill	Activity Description	Activity Type	On Development Plan?	Target Completion Date	Activity Link	Price	Completed?
1	Conduct a targeted needs assessment	Needs Assessment Basics	Book	☑	06/12/17	view	Member: $24.95 / List: $29.95	☐
1	Collaborate with learning design project members	ISD From the Ground Up (3rd Edition)	Book	☐		view	Member: $28.18 / List: $35.65	☐
1	Collaborate with learning design project members	Designer SME Collaboration	Book	☐		view	Member: $19.95 / List: $24.95	☐
1	Conduct a targeted needs assessment	Assessing Learning Needs	On Demand	☐		view	Member: $195 / List: $245	☐
1	Collaborate with learning design project members	Essentials of Working with SMEs to Develop Training	Workshop	☐		view	Member: $495 / List: $850	☐

Category	Task/Skill	Task Example	Min Value For Role	Employee Rating	Manager Rating	Blended Rating	Gap Btwn Min & Blended Rating
Creating And Closing Opportunities	Build business justification cases	view	3	2	1	1.4	-1.6
Creating And Closing Opportunities	Qualify opportunities	view	3	2	2	2	-1
Creating And Closing Opportunities	Develop winning proposals	view	3	1	3	2.2	-0.8

33

Make your competency model actionable

Contact Information

Cheryl Lasse, Managing Partner

407.876.9850

classe@skilldirector.com

SkillDirector.com

Link to download notes & templates

Link to ATD Skill Tracker

Link to Competency Models For Professional Development LinkedIn Group

Link to white paper: Why employees taking charge of their learning is good for you